

Participant Materials

The Linkage Excellence in Management & Leadership Series

Leading in a Networked World

Featuring Margaret Wheatley



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SECTION 1

Satellite Program Materials

Introduction

Welcome to *The 2001 Linkage Excellence in Management & Leadership Series*. This seminar series is designed to help you become a better manager and leader by developing the skills you need to be successful. This distance learning program will introduce you to some of the world's most outstanding and innovative thinkers in the areas of management and leadership.

Today's program "Leading in a Networked World" features Margaret Wheatley. Dr. Meg Wheatley has worked with a wide variety of organizations to share her unique perspective on leadership and interconnectedness. In today's program, Meg will explore her unique approach to helping organizations and individuals develop and fulfill their leadership abilities and potential. She will help you find ways to think about the new beliefs and behaviors leaders will need to have in today's complex and intertwined world.

Specifically the program will help provide insight in these competencies:

Trusted Influence

- The Empowerment Component

Conceptual Thinking

- The Innovation Component
- The Big-Picture Component

Systems Thinking

- The Mental Discipline Component

Margaret Wheatley writes, teaches and speaks about radically new practices and ideas for organizing in chaotic times. She works to help organizations of all types become worthy of human habitation, where people are seen as the blessing and not the problem. Currently, she is president of the Berkana Institute, a global charitable foundation that is experimenting with many forms of inquiry to delve into the future of human organizations.

Meg was an organizational consultant for many years as well as a professor of management in two graduate programs. Her work appears in two award-winning books, *Leadership and the New Science* (1992, 1999) and *A Simpler Way* (co-authored with Myron Kellner-Rogers, 1996) plus several videos and articles.

She draws many of her ideas from new science and life's ability to organize in self-organizing systemic and cooperative modes.

Introduction (continued)

Meg believes that leaders in today's complex world require profoundly new sets of beliefs and behaviors to lead their organizations. Today's leaders need to rely on human goodness; to depend on diversity; to trust people's good intentions. Leaders need to support people and to dwell in the complexity rather than to look for simple cause and effect relationships or to search for scapegoats.

Most importantly, leaders need to offer opportunities for meaningful work not for just the individual, but also for the greater good. In today's program, Meg will explore what we know about managing in a complex world. She will help you frame questions and think about your willingness to alter your beliefs and practices to align with those learnings.

In today's presentation Meg Wheatley will hold a conversation with you to help you explore new ways of thinking about your ideas and perceptions regarding the "real" way organizations do their work. She will help you think about the kinds of leadership that these new organizations will need. Meg will discuss how to help others clarify their vision and work effectively in the "thick web of relationships" that she believes are part of all systems.

These Participant Materials have been designed to complement Margaret Wheatley's presentation. Use them to augment or supplement the presentation and to take notes. At the end of Dr. Wheatley's presentation you will be able to submit questions via phone, fax or email.

Learning is a mental activity that requires more than passively watching a speaker. Simply watching today's program will not enable you to use these new organizational and personal attitudes and approaches to initiate an immediate change in your organization's culture. Actively using these new skills on a personal level can help you begin to make the language and attitudes your own.

Achieving leadership excellence in the current business environment requires practice and follow-through, as well as reflection. Use the *Pre-presentation* activities on pages 4-6 to prepare yourself for the program. Also included in your participant guide are *Post-presentation* activities to use after the program to think about ways to use the new skills you learned to broaden and deepen your personal knowledge.

What You Will Learn

By participating in today's program with Meg Wheatley you will learn to:

- Develop different perspectives on organizational and personal development
- Think about the ways networks and relationships contribute to effective leadership and strong organizations
- Determine from your own experience and perspective what brings out the best in people
- Reconsider your ideas about certainty in the reality of change
- Develop ways to think about the complex and interconnected aspects of your organization and the ways that new leaders need to behave to be effective

Pre-Presentation Activities

Pre-reading: Read or review some of the following books authored by Margaret Wheatley:

- *Leadership and the New Science, Discovering Order in A Chaotic World*, 2nd ed., Berrett-Koehler Publishers, 1999.
- *A Simpler Way* (with Myron Kellner-Rogers), Berrett-Koehler Publishers, 1996.
- Take time to read Section 1: Satellite Program Materials prior to attending the program. Familiarizing yourself with the materials and information Margaret Wheatley covers in the televised portion of the program will enhance your learning experience.

Reading the Satellite Program Materials prior to the program will help you to understand Meg Wheatley's unique approach. You will become familiar with her framework for looking at organizations and leadership and the language she uses to describe them. You will learn about her focus on incorporating the approaches of "new science" to grapple with ways to understand individuals and their organizations.

Pre-Presentation Activities (continued)

Words and Concepts: The following is a list of words and concepts that Margaret Wheatley uses in her discussions of organizations and those who people them. Some of these may seem like words or concepts that are simple and easy to understand, but Meg uses them in her unique way.

Please write your current (pre-program) definitions and/or understandings of the meaning of these words and concepts.

Quantum physics

Feedback loops

Process

Relationships

Complexity

Self-organizing systems

Self-reference

Coherence

Chaos theory

The “new science”

Pre-Presentation Activities (continued)

Leadership Assessment Instrument: Complete the Leadership Assessment Instrument™ (LAI), which appears in Section 2 beginning on page 27. The LAI was researched and developed by Linkage, Inc., in partnership with Dr. Warren Bennis. It focuses on the five personal characteristics, or competencies, essential to effective leadership and on the five skills leaders use to put these competencies into practice. Knowing your strengths and opportunities for development may help make today's presentation particularly relevant.

Focus on those competency areas and leadership skills identified in the introduction as Margaret Wheatley gives her presentation.

A Margaret Wheatley “Sampler”

The following information is meant as a Margaret Wheatley “sampler” of sorts. The purpose of this “sampler” is to help you become familiar with Meg’s work and unique perspective.

This information is meant to give you an informed framework in which to listen to Meg’s presentation. It is also meant to provide you with source material to take away following the presentation.

It is our hope that following this presentation you will search out her work for more detailed study.

Background and Context

Margaret Wheatley described her work in *Leadership and the New Science* as a “foray into a new land, a map—clear in places, vague in others—that would require further pioneers to describe and elaborate on its features and meanings.”

In her presentations and work with organizations, Meg Wheatley presents for your consideration a different and unique perspective on the ways organizations work and how the people in them behave. Her perspective is based on her engagement with and application of the “new sciences” to the field of organizational development. The “new sciences” include chaos theory, quantum physics and modern biology.

What is common to all of “new sciences,” is the emphasis on complexity and interconnectedness of systems. Nothing can be studied in isolation. Every study requires consideration of the ways in which things are connected and relate to other systems. These studies are further complicated by the notion that the very act of studying a system changes it.

Meg believes that what is similar to the study of systems in all of these different fields is that they operate on self-organizing principles. These self-organizing principles create systems that develop processes and complexities of their own. Further, the “reality” of each system is in the eyes of the beholder. The system is made up of all of the “realities” of each person who perceives and acts in the system.

These beliefs create a fuzziness and messiness to how we view the organization. This fuzziness impacts the ways that individuals behave in that system. But rather than see this as difficult and chaotic, Meg Wheatley challenges us to see this as the strength and wisdom of systems. Each organization has within it the multiple beliefs, skills, knowledge and experience of the individuals that inhabit the system.

From this perspective, we can understand Meg’s belief that leaders need to create organizations so that they will be places that value and support the people within them. In this way the organization will be the beneficiary of the multiple perspectives its people bring to bear.

The power of organizations then, is in the trust that the leader has in the diversity of the people within that organization. Finding ways to value this diversity and supporting and helping to strengthen the web of relationships within the system is, Meg Wheatley believes, the role and work of a leader.

The Definition of a Leader

There are many ideas about leadership and the roles and responsibilities of leaders. Meg Wheatley suggests the following:

A leader is one who...

has more faith in people
than they do
in themselves

and who courageously and patiently holds
opportunities open
long enough for their
self-confidence to
reemerge

The Logic of Life

Meg Wheatley's beliefs about organizations are based on her ideas about the "logic of life." These ideas from her book *A Simpler Way* are briefly presented below:

Everything is in a constant process of discovery and creating.

Things are changing all of the time.

Even change changes.

Every organism reinterprets the rules, creating exceptions for itself.

Thus, it creates new rules.

Life uses messes to get to well-ordered solutions.

Life doesn't share our desire for efficiency or neatness.

To find what works life uses redundancy, fuzziness, dense webs of relationships and unending trials and errors.

Life is intent on finding what works, not what's "right."

It's the ability to keep finding solutions that is important.

Any one solution is temporary.

There are no permanently right answers.

What keeps any organism alive is its capacity to keep changing and to find what works now.

Life creates more possibilities as it engages with opportunities.

There are no "windows of opportunity," narrow openings in the fabric of space-time that soon disappear forever.

Possibilities are infinite.

Possibilities beget more possibilities.

The Logic of Life (continued)

Life is attracted to order.

Life experiments until it discovers how to form a system that can support diverse members.

Individuals search out a wide range of possible relationships to discover whether they can organize into a life sustaining system.

These explorations continue until a system is discovered.

This system provides stability for its members.

Then individuals are less buffeted by change.

Life organizes around identity.

Every living thing acts to develop and preserve itself.

Identity is the filter that every organism or system uses to make sense of the world.

All new information, new relationships and changing environments are interpreted through a sense of self.

This tendency toward self-creation creates a seeming paradox.

An organism will change to maintain its identity.

Everything participates in the creation and evolution of its neighbors.

There are no unaffected outsiders.

No one system dictates conditions to another.

All participate together in creating the conditions of their interdependence.

Life Is Creative

Life is not a series of tests presented to us by hostile teachers. Meg Wheatley believes that there is ample evidence in the world that life is exploring to see what works. There is no one right answer and it is silly to think that we need to “get it right the first time.”

Meg tells us that what organizations need to do is to develop opportunities for individuals to experiment. They need to focus on finding pretty good solutions that work for now. Leaders need to provide opportunities for individuals to discover what works in their particular part of the universe of any organization. This is the task for everyone in the organization.

Playful and creative enterprises are messy and redundant. What works is not careful stepwise analysis in the hands of a few experts, but having large numbers of populations messing around in the task of creation.

Parallel redundant systems require effort that results in providing more information to solve problems.

Life Cannot Resist Organizing

Meg says that simple patterns create organization. From simple relationships patterns of organization emerge. Networks have the capacity to self-organize. Self-organization is occurring everywhere and all of the time.

Self-organizing systems, Margaret Wheatley tell us, develop when there is disequilibrium. Open systems stay off balance so that the systems can change and grow. Self-organizing systems function like thermostats for a heating system. They create feedback loops to provide not stability but growth.

Faced with increasing levels of disturbance these systems possess the innate ability to deal with new information and adapt. They are resilient rather than rigid and stable.

Information — The Creative Energy of the Universe

Meg Wheatley puts forth the following as critical characteristics of *information*.

Information is a dynamic, changing element, taking center stage.

Information is essential to anything new.

Information is absolutely essential for emergence of new order.

Information is used by all life to organize it in form.

An individual is not a stable structure but a continuous process of organizing information.

Life uses information to organize matter into form. Think about the word itself: *in-formation*.

The Role of Information in Self-Organizing Systems

If an organization seeking to develop the life-saving qualities of adaptability, it needs to open itself in many ways. Meg tells us that the role of the leadership of the organization is to support and encourage positive attitudes and behaviors to opening itself to actively seek information from everywhere. Then it must circulate the information freely so that many people in the system can interpret it.

Meg believes that these flexible and adaptable self-organizing systems actively seek new information to keep the system off-balance. This will keep the organization off-balance so that it will be open to growth. Seeking only information that validates its present state may feel good, but it will close off the information that it needs to adapt to change.

Openness to the environment over time spawns a stronger system. This openness can make the organization less susceptible to externally dictated change. When leaders support this kind of openness they encourage the people in the organization to develop new capacities to make it and them increasingly resourceful.

Life Organizes into Patterns

Meg encourages us to look for recurring behaviors and themes and to stay away from the seduction of examining isolated factors or individual players. To see patterns we have to step back from the problem and gain perspective. The best way to find patterns is to sit together and reflect patiently. This reflection can lead us to think about sets of behaviors that will help to strengthen and support these patterns.

Recognizing the power of discovering basic patterns, Meg tells us, can help us to think about effecting organizational change in a new way. We can see that it is important to look for and to identify the patterns that reveal themselves through behavior. We can sit together to decide the values and agreements that will support the new behaviors.

The Task of the Leader

Meg Wheatley believes that the leader's task is to help the organization work together to develop simple governing principles: guiding visions, sincere values, and organizational beliefs – the few self-referential ideas that individuals can use to shape their behavior

The leader's task is first to embody these principles and then help the organization become the standard it has declared for itself. Meg reminds us that behaviors don't change by announcing them from on high. They change when leaders truly and genuinely walk the talk, practice what they preach, and live in what they say.

Leaders are also obligated to help the whole organization look at itself, to be reflective and knowledgeable about its activities and decisions.

The Task of the Leader in a Chaotic World

The leader's role, Meg Wheatley tells us, is not to make sure that people know exactly what to do and when to do it. Instead, leaders need to ensure that there is strong and evolving clarity about who the organization is.

Meg believes that when this clear identity is available, it serves every member of the organization. This is particularly important in chaotic times. Even in chaotic circumstances individuals can make congruent decisions.

She reminds us that it is sometimes difficult to believe that clarity of principle will protect us and be sufficient in chaotic circumstances. Our training often urges us to interfere to prevent further difficulty. Meg tells us that when things become chaotic this clarity keeps us on course.

In this chaotic world, Meg believes we need leaders, not bosses. We need leaders to help us develop the clear identity that lights the dark of confusion. We need leaders to support us as we learn how to live by our values.

We need leaders to understand that we are best controlled by concepts that invite our participation, not policies and procedures that curtail our contribution. Meg points out that the research of the past several years has demonstrated the strength and resiliency of companies that have strong values.

Adding to this research is the voice of chaos theory that tells us that seemingly chaotic processes work with simple formulas to create astonishing complexity and capacity. Meg reminds us that our job as leaders is to help the system uncover those "simple formulas."

Networked World — Organizational Relationships

Systems become more self-aware as they inquire into three domains:

- identity
- information
- relationships

Meg Wheatley tells us that as the system (organization) becomes more connected to what it is, it becomes more connected to its environment and its customers. These new connections develop greater capacity and the system becomes healthier.

Systems are relationships that we observe as structures. Meg describes these relationships as ones that can't be structured. The relationships in organizations develop as dense webs. The relationships do not work the way a traditional organizational chart shows them.

These dense webs, or networks of relationships, develop as individuals explore their needs together. Explorations are messy and their shape cannot be predicted. Relationships spin out as individuals wander, negotiate, and discover the connections vital to their work.

Meg believes that relationships are the essential conditions of the organizations that we see. We live in a universe where relationships are primary. In many organizations there is a fear that considers people dangerous and develops structures to keep them separate.

Meg tells us that in systems (organizations) where there is trust, people are free to develop the relationships they need. Trust enables a system to be open and include the people it needs. The more diverse the conversations, the more likely it is that the system will grow and be healthy.

The Leader's Job in a Networked World

Meg Wheatley believes that leaders can help an organization become focused on developing greater knowledge in three critical areas. These areas include developing a fundamental identity, connecting to new information, and developing relationships.

Leaders help connect people to the fundamental identity of the organization by answering some of the following questions:

- Who are we?
- Who do we aspire to become?
- How shall we be together?

Answering the following questions can help further people's need to be connected to new information.

- What else do we need to know?
- Where is this new information to be found?

Leaders can also help people reach past traditional boundaries and develop relationships with people anywhere in the system by considering:

- Who needs to be here to do this work with us?
- Have we included everyone we need?

The Networked World and Ideas about "Certainty"

Meg reminds us that we grew up in a world that valued certainty. We were rewarded by behavior that indicated certainty. Knowing the right answer on a test was rewarded. As leaders we were promoted for our certainty and belief that we had the vision and knew how to get there.

Meg discusses the ways that the networked world moves at the speed of light and "truth" mutates before our eyes, thus threatening our ideas of certainty. In spite of this, we are hard pressed to give up our certainty, our positions, beliefs and explanations. These things lie at the heart of our identity.

Meg Wheatley puts forth the idea that while we won't necessarily have to let go of all of our cherished beliefs, we do need to be willing to let them go. We also have to be willing to make our beliefs and opinions visible so that we can willingly choose or discard them.

Everyone Sees the World from His/Her Own Place

Meg reminds us that we live in a dense and tangled global system. Inside this dense and interconnected world, everyone has a different vantage point. Each person has a unique biological identity and sees the world from that perspective or from the viewpoint of where he/she sits in the system.

As complexity grows we need more colleagues to describe to us what they see, what it looks like from their perspective. Wise leaders know this and welcome these many different perspectives into the process of designing the work and growing the organization.

Meg discusses how this much complexity in the world ensures us that no person can explain what is going on to everyone else, or assume that his or her point of view is the right one. We can look at this as a modern Tower of Babel or see it as an opportunity to come together and truly listen to one another. We need to listen with eagerness to hear something new and different. This will enliven and strengthen both our organizations and us as individuals.

New Beliefs to Guide Change

One of the most essential responsibilities and roles of leaders in today's networked and rapidly changing world is that of a change agent. Meg Wheatley suggests the following beliefs as a guide to a leader seeking to help the system bring about change.

These beliefs flow from and are based on many of Meg's ideas and beliefs about systems and the behavior of individuals in them that have been presented here.

No one gets it right the first time

Imposition always fails

People only support what they create

The solutions are already in the system

Change is always a change in meaning

Responsibility is a result of caring

Compassion and forgiveness are essential

In Summary

The following is a brief summary of Meg Wheatley's beliefs and ideas as presented in these materials.

Life moves toward other life. Systems are a naturally occurring phenomenon. We need to trust these cohering motions and support the system's freedom. This means supporting the system to explore new connections, new information and new ways of being. It means focusing on opening the system in all ways. It means trusting that by doing so, the system will grow in health and capacity.

Systems become healthier as they open to include greater variety. When diversity abounds in an environment of freedom, the result is strong and resilient systems and organizations. Change can be invented anywhere and move through a well-connected system.

It is the essential task of the leader in these systems to support openness, diversity, and connection.

A vertical line on the left side of the page is followed by 25 horizontal lines, creating a ruled area for writing.

A series of horizontal lines for writing, starting from the top of the page and extending down to the bottom. The lines are evenly spaced and cover most of the page width.

When This Session Has Concluded

Turn to the end of these materials. Complete the Participant Evaluation Form on page 53 and return it to your Site Coordinator.

Your feedback is integral to ensuring the integrity of this and future programs. We take pride in providing relevant, thought provoking, and enlightening programs. But we rely on you to help us make it happen!

Post-Presentation Activities

Turn back to the Pre-Presentation Activities—Words and Concepts on page 6 in your Participant Guide and review your responses.

Complete any items you were unable to finish before the presentation.

Correct and/or add to your responses in light of your review of the pre-presentation materials and viewing the satellite broadcast.

In what ways does your vision, concept and idea about leadership agree with or vary from the one that Meg Wheatley puts forth on page 10 of the your Participant Guide?

Think about the current leadership in your organization. In what ways does it match Meg Wheatley’s view of leadership? In what ways does it differ?

Consider your own leadership behaviors. In what ways could you foster the kind of openness, diversity, and web of connections that Meg describes?

SECTION 2

The Leadership Assessment Instrument™

Excerpted from The Leadership Assessment Instrument™ and Development Guide,
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About the Leadership Assessment Instrument™

The Leadership Assessment Instrument™ (LAI) was researched and developed by Linkage, Inc., in partnership with Dr. Warren Bennis. It focuses on the five personal characteristics, or competencies, essential to effective leadership and on the five skills with which leaders put these competencies into practice. Knowing your strengths and opportunities for development may help make today's presentation particularly relevant.

The five categories the instrument assesses are:

1. Focused drive
2. Emotional intelligence
3. Building trust/enabling others
4. Conceptual thinking
5. Systems thinking

Each competency and each skill has a definition and an associated set of behaviors that demonstrate that competency or skill. Additionally, each competency is described by ten of these behaviors and each skill by five. Furthermore, the ten behaviors for each competency are organized into two groups of five, each corresponding to a component of that competency.

Let's take a closer look at the five competency categories in greater detail.

Focused Drive

The competency of focusing on a goal and harnessing your energy in order to meet that goal—a balance between the components of:

- Focus: The ability to identify an important goal or vision and to channel efforts at specific targets that support that goal or vision.
- Drive: The ability to persevere, sacrifice (when necessary), and expend high degrees of energy to reach high levels of performance.

Emotional Intelligence

The competency of understanding and mastering your emotions (and those of others) in a way that instills confidence, motivates, inspires, and enhances group effectiveness—a balance between the components of:

- Perception: The ability to read the emotions and thoughts of others through the use of insight and analytical skills.
- Emotional Maturity: The ability to master emotions and cope with stress in a way that instills confidence, motivates, and enhances group effectiveness.

Trusted Influence

The competency of evoking trust from others and placing trust in others to enable them to succeed—a balance between the components of:

- **Commitment:** The ability to evoke trust from others by keeping commitments, adhering to high ethical standards and principles, and building shared goals or values.
- **Empowerment:** The ability to help others reach higher levels of performance through trust, delegation, participation, and coaching.

Conceptual Thinking

The competency of conceiving and selecting innovative strategies and ideas for your organization—a balance of the components of:

- **Innovation:** The ability to create/enhance ideas, products, and services that lead to bottom-line success.
- **Big-Picture Thinking:** The ability to see all of the forces, events, entities, and people that are affecting (or are being affected by) the situation at hand.

Systems Thinking

The competency of rigorously and systematically connecting processes, events and systems—a balance between the components of:

- **Mental Discipline:** The ability to sort through ambiguity and alternatives in a way that crystallizes and puts ideas into action.
- **Process Orientation:** The ability to increase overall learning and performance by designing, implementing, and/or connecting processes.

While today's program is most relevant to conceptual thinking, trusted influence and systems thinking, having an awareness of your rating in each area provides insight and may make today's program more meaningful. Instructions for completing and scoring the assessment are provided on the following pages.

Purpose and overview

The purpose of this Leadership Self-Assessment is to provide a leadership profile based on the competencies necessary for strong, superior leadership. The data that you provide will enable you to construct a profile, complete with areas of strength and areas for future development.

Please complete the instrument by assessing your own behaviors and skills according to the directions below. Be honest—the more rigorous you are, the better you can target your developmental needs. Remember, the instrument is meant to assess how you believe that you actually are; not how you think that you should be.

Directions

For each of the 50 items listed on the following pages, consider how much the stated behavior characterizes your own behaviors, thoughts, intentions, or skills in on-the-job situations, and then rate yourself in the space provided according to the following scale:

3 = I often demonstrate this behavior

2 = I sometimes demonstrate this behavior

1 = I hardly ever demonstrate this behavior

Use the enclosed answer sheet (page 34) to record your answers. After recording your answers, add up the totals for each competency and then transfer the overall competency scores to the competency profile sheet on page 35.

Leadership Self-Assessment Questions

1. I balance multiple tasks and prioritize when faced with limited time and/or resources.
2. I create a positive environment—even when it appears “all is lost”—by expressing optimism and offering encouragement to team members.
3. I keep a mental record of every commitment that I make and follow through on my promises.
4. I steer through ambiguity and “information clutter” to resolve complex problems.
5. I ask questions to try to piece together “unrelated” information, events, etc.
6. I build momentum by spending 90 percent of my time on the top 10 percent of my priority list.
7. I view my “wins” with pride and humility.
8. I operate by a value-driven work philosophy that is grounded on clear principles.
9. I adhere to a disciplined process for sorting out alternatives and arriving at the best option when approaching a problem or project.
10. I make connections between and among information, events, etc. that reveal key issues, problems, or opportunities.
11. I display single-mindedness in unstoppably directing my energy at specific targets.
12. I persuasively and effectively reassure teams and/or individuals in the face of setbacks or seemingly insurmountable obstacles.
13. I identify and find ways to meet the needs, expectations, and wants of others up, down, and across the organization.
14. I test ideas and assumptions by carefully reviewing ideas with thought leaders and critical thinkers within my organization.
15. I do not accept a problem at face value, but search for the less obvious underlying factors driving the problem.
16. I find a way to “get it done” and will sacrifice personally to reach the goal line.
17. I have a thorough understanding of my own emotions and feelings and how they impact the situation at hand.
18. I give people a sense of personal fulfillment by recognizing their individual contributions in the achievement of a goal.

Leadership Self-Assessment (continued)

19. I consult outside resources (e.g., magazines and databases) in order to identify where my company, my industry, and the market are moving and to size up new business opportunities.
20. I take into account the potential implications of a decision on other people/departments within the organization before moving forward.
21. I stay the course mentally despite potential distractions and disruptions to my primary focus.
22. I control and selectively display my emotions and feelings in a beneficial way (e.g., I successfully channel my anger).
23. I help build shared goals and values to reinforce individual commitment to the organization.
24. I create viable new business ideas by thinking "out of the box," as well as in a sound business fashion.
25. I build and connect processes within my organization to assure that implementation remains constant and reliable.
26. I display stamina, energy, and intensity in achieving high standards of performance.
27. I express myself in consistent moods that invite participation and further communication with others.
28. I provide honest, clear feedback by focusing on the issue (and not the person) so that the person will accept and consider the feedback.
29. I ask "What if?" questions and play out scenarios to test new business ideas that challenge the status quo.
30. I assure that new ideas are integrated with established procedures/processes so that the organization can digest the new ideas.
31. I act decisively, with a passion for making things happen.
32. I recognize and consider the emotions and feelings of others before taking action.
33. I articulate a goal or vision and motivate others to help me reach that goal/vision.
34. I have the ability to create unorthodox or revolutionary concepts that have growth or profit potential.
35. I create synergy by involving the "right people" in all phases of work design and operational implementation.

Leadership Self-Assessment (continued)

36. I demonstrate boldness in striving for ambitious goals rather than settling for the safety of achievable results.
37. I treat different people differently, with appropriate amounts of candor and sensitivity depending on each individual's own unique makeup.
38. I create shared responsibility among team members by building participation in decision making and delegating key tasks/functions.
39. I take the time to check whether a new idea is feasible before proceeding.
40. I pull together disparate ideas to create clear themes and pathways that may alleviate the confusion and anxiety of others.
41. I seek—and find—creative solutions to obstacles blocking the path to the goal line.
42. I accept rejection with grace and renewed determination, modeling to others how to handle failure.
43. I display trust in others by giving them additional responsibilities—and providing them with the appropriate tools and resources necessary to carry those responsibilities out.
44. I seek better solutions to problems instead of falling back on established protocol.
45. I demonstrate a commitment to continuous learning by documenting critically important action steps, i.e., I try to make sure that my organization does not “reinvent the wheel.”
46. I effectively communicate the critical nature of the goal in a way that allows others to focus on that goal, as well.
47. I offer solutions, suggestions, and constructive criticism to others while also remaining open to additional possibilities.
48. I successfully help individuals and teams reach higher levels of performance, e.g., by displaying confidence in them at critical junctures.
49. I act receptive to the new ideas of others and try to improve or enhance them in a non-threatening manner.
50. I see an entity (e.g., my organization) not merely as a collection of isolated processes and parts, but as a unitary whole of interconnected processes.

Leadership Self-Assessment Answer Sheet

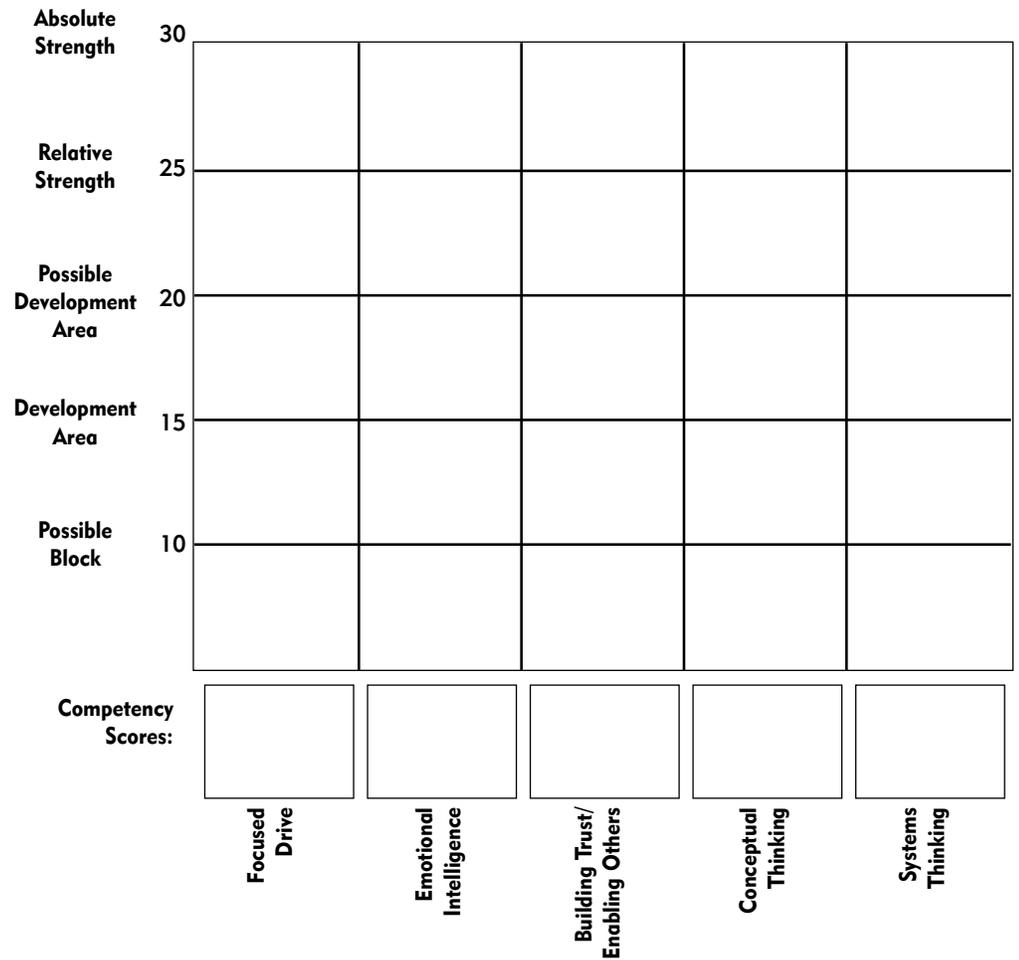
Focused Drive	Emotional Intelligence	Building Trust/ Enabling Others	Conceptual Thinking	Systems Thinking
1. _____	2. _____	3. _____	4. _____	5. _____
6. _____	7. _____	8. _____	9. _____	10. _____
11. _____	12. _____	13. _____	14. _____	15. _____
16. _____	17. _____	18. _____	19. _____	20. _____
21. _____	22. _____	23. _____	24. _____	25. _____
26. _____	27. _____	28. _____	29. _____	30. _____
31. _____	32. _____	33. _____	34. _____	35. _____
36. _____	37. _____	38. _____	39. _____	40. _____
41. _____	42. _____	43. _____	44. _____	45. _____
46. _____	47. _____	48. _____	49. _____	50. _____
TOTALS:				
_____	_____	_____	_____	_____

Individual Development Planning:

Leadership Competencies

Competency Profile Sheet

1. Transfer your overall competency scores from the answer sheet to the corresponding boxes below.
2. Plot points on the graph using the scale on the left.
3. Connect the dots to see your overall competency profile.



SECTION 3

The Leadership Development Guide

The following activities are excerpts from the Leadership Development Guide, a guide researched and developed by Linkage, Inc. in partnership with Dr. Warren Bennis. These activities were selected because of their relevance to today's program.

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Developing the Competency of Conceptual Thinking: The Innovation Component

Definition

The ability to create/enhance ideas, products, and services that lead to bottom-line success

Behaviors

- Asks “What if?” questions to test assumptions and challenge the status quo
- Seeks better solutions to problems instead of falling back on obvious ones
- Demonstrates an ability to create new business ideas by thinking “out of the box”
- Demonstrates creativity in making ideas and concepts better
- Creates innovative concepts that have growth or profit potential

Exercise: New Product Ideas

The following exercise is one you can do either on your own or with a group.

1. Take an everyday object (such as a brick, or a toothbrush), and come up with as many uses for it as you can think of.

Example: A brick could be used, among other things, as a paperweight, a weapon for self-defense, a bookend, a pedestal to support a vase or small statuette, a flyswatter or bug-smasher, a doorstop, or a stepping stone for crossing puddles.

2. Identify which of these uses could yield a product that would complement your organization’s products or services.

Example: Let’s say your company owns and manages a chain of bookstores. You might print the name and logo of the company on bricks and sell them as hip “urban bookends.”

Exercise: Your Conditions for Creativity

How often have you heard someone say, “I do my best thinking in the shower” or “I always seem to have my best ideas in my car on the way to work”? If you’re like most people, there are probably certain conditions that are conducive to your thinking creatively, and others that hinder your creativity.

In this brief exercise, you’ll try to identify what these conditions are.

1. Identify some times when you’ve been able to think creatively.
2. Think about what each of those times were like:
 - Were you alone, or with others?
 - If you were with others, who specifically were they?
 - Where were you (for example, indoors or outdoors, at home or at work)?
 - What was the space like (for example, bright or dark, cluttered or spare)?
 - What time of day was it?
 - What else was going on at the time (For example, was your schedule busy or light, were you under pressure or not)?
3. Try to identify patterns—that is, are there conditions that were common to most or all of the times when you were able to think creatively?
4. Repeat steps 1 to 3, this time for situations in which you were unable to think creatively.
5. In the future, when you need to think creatively, try to recreate the conditions that seemed to foster creativity in the past, while avoiding conditions that hindered creativity.

Daily Practices

- When you're seeking new ideas or innovative solutions, or when you're faced with a problem for which there is no easy solution, do something different. Often, change is all it takes to send your thinking in new directions.
- Change the conditions in which you work. For example, if you're working in an office, try taking a walk. If you're working alone, find someone to talk with. If you're working late in the day, try working first thing in the morning.
- Change your methods. You might consider "thinking aloud" by talking things out with a colleague. Or, create interesting and unusual metaphors for the topic or issue you face and think through all the characteristics and implications of seeing it in these different ways.
- Change your medium. For example, rather than thinking it through alone, try using a computer or paper and pen, writing non-stop for five minutes. Record your thoughts unedited, then read your thoughts with an eye toward emerging insights, connections, and possibilities. Or, draw a picture that symbolically represents either the issue you face or your relationship to the issue.
- Practice asking "What if?" questions. Do this by first identifying something you take for granted (such as gravity, your organization's core product line or lines, or the fact that people only have two arms!) Then try to imagine what all the implications would be if that fact you take for granted were no longer the case: What would life be like if there was no gravity? If your organization had to totally reconfigure its product lines? If people regularly had different numbers of arms?

As with the new products exercise, above, this is a great practice to use with a group. For example, it's helpful as a way of "limbering up" people's minds at the start of a meeting.

- Institute regular brainstorming or creativity forums, where people come together with no purpose other than thinking up new ideas or ways of doing things. The only outcome of such meetings should be lists of possibilities to be explored further, and commitments to meet again to analyze the possibilities.
- Make it a regular practice to read articles or books in areas about which you know very little. These should offer new perspectives on your areas of expertise and help enrich your approach to strategic thinking and problem solving.

Activities, Assignments, and Projects

- Lead or participate on a team charged with “scanning” the organization’s environment to identify critical trends that may affect the organization in the future.
- Lead or participate on a team charged with solving a difficult problem faced by the organization.
- Seek a developmental assignment in a function that requires “out of the box” thinking, such as research and development or marketing.
- Creativity and innovation are enhanced when we work differently with the material before us and/or when we represent that material in a fresh way. When you encounter a difficult issue or problem for which there is no easy solution, consider inventive activities as alternatives to simply thinking through something alone or “talking it out” as a team.
- Write nonstop for five minutes, recording your unedited thoughts on paper.
- Create an interesting and unusual metaphor for the topic or issue and think through all the characteristics and implications of seeing it this way.
- Draw a picture that symbolically represents either the issue you face or your relationship to the issue.

Readings and Other Self-Study Resources

- Albrecht, Karl, *Brain Power: Learn to Improve Your Thinking Skills*. Prentice Hall, 1987. This book introduces six functional thinking abilities needed to become an adaptive, innovative thinker. The author shows how to use creative problem solving strategies to become a more efficient and effective thinker and provides illustrations, games, and puzzles to stimulate and expand your brain power.
- Bennis, Warren, and Patricia Ward Biederman, *Organizing Genius*. Addison-Wesley Publishing, 1997. Today all organizations require creative thinking from every member, not just a few. The world's complexity and pace mean that we can no longer rely on individual leaders and "Lone Rangers" to solve our problems. Rather, we must learn to work together, to identify our own Great Groups. The fascinating stories and wise advice in *Organizing Genius* show us how.
- Brown, M. Neil and Stuart M. Keeley, *Asking the Right Questions*. New York: Prentice Hall, 1990. This test was designed to help readers bridge the gap between simple memorization and critical analysis and synthesis. The authors teach readers how to react rationally to alternative points of view and to develop a solid foundation for making personal choices about what to accept and what to reject as they read and listen.
- *Conceptual Blockbusting: A Guide to Better Ideas*. Addison-Wesley Publishing Company, 1990. This book explores the nature of creation and the capacity of each individual to be more creative. Includes techniques on how to recognize barriers to creativity and develop ways to overcome them.
- DeBono, Edward, *Lateral Thinking: Creativity Step-By-Step*. Harper Collins, 1991. This book introduces a new way of reasoning and decision making through encouraging lateral thinking. Special techniques are taught to generate these new ideas.
- Fritz, Robert, *Creating*, Ballantine Books, 1991. This book brings you a series of practical exercises to help you create what you want. It will help to train you in the creative process and give you practical ways to use those skills to achieve the results you want.
- *Innovative Project Teams*, video, 40 min., Harvard Business School, 1998. What could a power company, a surgical instrument manufacturer, and a newspaper publisher possibly have in common—problem so critical that it is literally threatening their survival. This video will show your managers that harnessing the power and innovation of teams can solve the most daunting of problems, often getting more done for less.
- Leonard, Dorothy, *Wellsprings of Knowledge*. Harvard Business School, 1998. Why are some companies better at managing innovation than others? With her pioneering book on knowledge management, Dorothy Leonard was among the first to probe the relationship between successful innovators and the way they create, nurture, and grow the experience and accumulated knowledge of their organization. The book is illustrated with examples of successes and failures in new product development, continuing to provide managers with the key knowledge-building activities they need to guide, control, and inspire.

- Nadler, Gerald, and Shozo Hibino, *Breakthrough Thinking: The Seven Principles of Creative Problem Solving*, Prima Publishing, 1994. This American/Japanese collaboration contains the results of the authors' ground-breaking studies on how the most intuitive and creative leaders and organizations solve problems. They show how to improve incorrect thinking, which they contend accounts for the failure of many enterprises.
- Perkins, David, *Knowledge as Design*. Lawrence Erlbaum Assoc., 1986. This book will help you to analyze your thinking process, especially the creative analytical process.
- Quinn, James Brian et. al., *Innovation Explosion*. Jossey-Bass, 1997. Here is a new book on how both entrepreneurs and nations can develop, harness, and utilize intellect, science, and technology to maximize innovation and growth. With co-authors Jordan J. Baruch and Karen Anne Zien, Quinn reveals in practical terms how successful firms can intertwine intellectual capital and modern software capabilities to cut innovation cycle times by 90%, costs by 75%, and risks by 60% or more, and thereby revolutionize all aspects of innovation management, corporate strategy, national policy, and even economics.
- Von Oech, Roger, *A Whack on the Side of the Head*. Warner Books, 1993. The author provides puzzles, exercises, metaphors, questions, stories and tips to help you systematically break through your mental blocks and unlock your mind for creative thinking. This book will help you to come up with new approaches to old problems.

Developing the Competency of Trusted Influence: The Empowerment Component**Definition**

The ability to help others reach higher levels of performance through trust, delegation, participation, and coaching

Behaviours

- Displays trust in others by giving them additional responsibilities
- Displays confidence in individuals by delegating key tasks/functions
- Provides clear feedback by focusing on the issue and/or behaviour (not the person)
- Creates shared responsibility by building participation in decision making
- Takes steps to make sure that others have the tools/resources necessary to fulfill their roles and responsibilities

Exercise: The Leadership/Technical Split

As a leader, you will be successful to the extent that you can free yourself from the “technical” work of your unit by giving those you lead the skills, resources, and “space” to take on this work.

1. List all your activities in a given day or week, along with the time spent on each.
2. For each activity, identify whether it is a “leadership” or “technical” activity.
 - A “leadership” activity is one that organizes or enables the work of the people you manage, such as planning, budgeting, or coaching.
 - A “technical” activity is one that involves performing the tasks that produce outputs for your unit’s customers.
3. Consider the technical activity that takes up the largest part of your time.
 - Why aren’t the people you lead doing this work?
 - Are there any reasons why they can’t currently do this work?

- What can you do to help them take on more responsibility for this work?
 - What are the short-term costs and risks of giving them this responsibility?
 - What are the long-term payoffs, and do they outweigh the risks?
4. If it makes sense to do so, create a plan for how you will provide those you lead with the skills, resources, and space to take on this work.

Exercise: Expanding Your Decision-Making Options

One powerful step you can take is to involve people in decision making about issues that affect them. This is not an either/or situation, where either you make the decisions or someone else does. Rather, there is a spectrum of possibilities for reaching decisions:

You may complete this exercise either for an individual you lead or for the group that reports to you.

1. List the decisions you currently make that affect the individual or group.
2. For each decision, describe how it is made.
3. For each decision, describe the readiness (expertise and maturity level) of those affected to become involved in the decision.
4. Based on this work, for each decision assess whether you're using the appropriate decision-making approach. If not, identify a more appropriate approach to use in the future.

Daily Practices

- Discourage others from relying on you to solve their problems. Make yourself available, but encourage them to approach you only once they are ready to give:
 - A clear statement of the problem as they understand it
 - The options they believe are available
 - A recommended option and the reasoning for selecting that option

- If you disagree with their thinking, don't criticize them or reject it out of hand. Rather, encourage them to explore the options further, asking questions such as, "Have you considered other options?" or "What would happen if . . . ?"
- Constantly seek ways to increase the amount of information your employees receive, their degree of involvement in decision making, and their accountability for results. One way to do this is to change the questions you ask yourself.
- If you don't already do so, make it a practice to ask those you lead how much information, involvement, and accountability they would like to have.
- Increase the amount of feedback you give others—both for successful and unsuccessful performance.
- Be conscious of how you deliver the feedback, especially regarding mistakes or failures. If you tend to criticize, punish, and/or take things over, try instead to use these situations as opportunities for learning.
- This is a way of structuring conversations so that people are given a chance to "vent" (in "the swamp"), but then are encouraged to think through the situation and come to a resolution about next steps.

Activities, Assignments, and Projects

- Volunteer to lead projects with unusually difficult time frames and deadlines. This will put you in a situation where success will require you to delegate responsibility to others.
- Participate on a team charged with improving or reengineering a process. Such work almost always involves identifying roadblocks or inefficiencies that can be remedied by empowering people on the line to make more decisions and take on greater accountabilities.

Readings and Other Self-Study Resources

Bellman, Geoffrey M., *Getting Things Done When You're Not in Charge*. Fireside, 1993. Bellman helps the consultant who does not have any formal power in an organisation, to help others gain success and create change. He focuses on developing leadership skills, gaining empowerment, understanding organisational politics, and creating change. He provides refreshing ways to think of “internal customers” and offers a lot of practical information to use in daily work.

Blanchard, Ken, *Empowerment Takes More Than a Minute*. Berrett-Koehler, 1996. This book explains how to empower the workforce by moving from a command-and-control mindset to a supportive, responsibility-centered environment in which all employees have the opportunity and responsibility to do their best.

Block, Peter, *The Empowered Manager*. Jossey-Bass, 1990. In this book, Block shows managers how to break out of the bureaucratic mode of thinking and take more responsibility for the workings of their unit. He explains how managers can become empowered to make positive changes in their organisation and develop an entrepreneurial spirit in themselves and in members of their unit.

Hersey, Paul, *The Situational Leader*. Warner Books, 1985. The author provides a brief guide, based on the situational leadership model, that describes how to develop people and effectively utilize human resources.

Kelly, John and James Jenks, *Don't Do—Delegate!* Ballantine Books, 1994. This book is full of tips and techniques to help you manage your job, rather than have your job manage you. Explore how to effectively make assignments, how to decide who will get the job done, overcome obstacles, build trust, and coach.

Kushel, Gerald, *Reaching the Peak Performance Zone*. AMACOM, 1994. This book contends that the difference between outstanding work and average work is an internal drive to achieve peak performance. Managers who are peak performers can encourage and teach others how to reach the peak performance zone.

McGinnis, Alan Loy, *Bringing Out the Best in People*. Augsburg Publishing, 1991. The author based the principles of this book on his research of great leaders throughout history, highly effective organisations, and the input of many prominent psychologists. Through case studies and anecdotes, this book shows how to put 12 key principles to work to inspire, motivate, and persuade others.

McLagan, Patricia, and Christo Nel. *The Age of Participation*. Berrett-Koehler, 1995. *The Age of Participation* focuses on participation in the workplace, blending theory and practice in numerous examples and industry models. Specific attention is given to values, competencies, leadership, and organisational structures.

Developing the Competency of Systems Thinking: The Mental Discipline Component**Definition**

The ability to sort through ambiguity and alternatives in a way that crystallizes and puts ideas into action

Behaviors

- Displays rigor and discipline in his/her thinking in difficult situations
- Thoughtfully reaches conclusions by reviewing ideas and assumptions with key individuals within the organization
- Crystallizes thoughts by deliberately and systematically steering through ambiguity and information clutter
- Critically and thoroughly analyzes the data available on alternatives when seeking the best solution to a problem
- Thinks through problems in a logical and well-organized fashion

Exercise: Scanning Your Sources

1. Identify a decision you face currently or will face in the immediate future.
2. Given your typical decision-making habits, is it likely that you will consult other resources to help you reach a decision? If the answer is “yes,” quickly list the resources you are likely to use.
3. Now take time for a more deliberate consideration of resources. To begin, list the available data sources you can draw upon to help you reach an informed decision. (Consider, for example, all pertinent company reports and documents, print and electronic resources, and information obtainable from informed individuals.)
4. List those individuals or groups who might offer valuable perspectives that can improve the quality and thoroughness of your decision making. (Consider, for example, colleagues, direct reports, in-house experts, outside experts, diverse stakeholders, your network of business contacts, and disinterested friends and family members.)
5. If the list you generated in response to questions 2 and 3 is larger than the list you generated in response to question 2, consider the implications. For example, do you tend to rely on certain types of resources? Would it be valuable to gather information in this more deliberate manner in the future? Might you be able to generate a list of “go-to” sources for many of your key decisions?

Daily Practices

- If you tend to “jump to action,” try adopting a structured analytical approach. There are many, many of these in the public domain, and with few exceptions, they all offer some variation on the following steps:
 - State the situation (problem, challenge, or opportunity) as it first presents itself.
 - Gather more information about the situation.
 - Analyze the situation to understand the dynamics driving it.
 - Develop possible actions.
 - Select the action(s), based on clear criteria.
 - Implement the actions.

What’s most important is that you use a structured approach, not which one you use. Any of them will provide a means of disciplining yourself to avoid jumping to actions that are either misguided or suboptimal.

- Make a habit of testing your ideas and plans with people who are likely to be critical. Explain the decision(s) you have made and walk people through the steps you followed to reach the decision(s): Specifically, explain
 - What information you gathered and how you gathered it
 - How you interpreted the information
 - The various options you explored
 - The criteria you used to reach your decision(s)

Use the feedback to improve or revise your decision(s), plan countermeasures, and so on.

- Avoid information cluttering by distilling key points. When working in an area where vast amounts of data, knowledge, and analysis exist, practice boiling it all down to just two or three essential points or themes.
- When faced with a challenging decision, actively seek outside perspectives such as those offered by suppliers, customers, stockholders of the company, disinterested family, and friends rather than trusting only to internal information.

Activities, Assignments, and Projects

- If you don’t already do so, participate in strategic planning for your business unit or organization. If it is not possible to participate directly, create a “shadow” plan on your own or with some colleagues you respect. Be sure to follow a strategic planning process, such as that outlined by Michael Porter in *Competitive Strategy* (see “Readings and Other Self-Study Resources,” below).

- Join the Board of a not-for-profit organization and participate in their planning process. If you are not in a position to participate in the strategic planning of your company, you may find that joining a not-for-profit Board—especially of a smaller, community-based organization—offers the opportunity to have a significant impact on that organization’s future direction.
- Learn to play chess as a means of honing your ability to sort through alternative future scenarios.

Readings and Other Self-Study Resources

- Drucker, Peter F., *Managing for the Future*. NAL-Dutton, 1992. The author provides five “gauges” for best measuring how your company’s operation is running: market position, innovation, productivity, liquidity, and profitability. This book examines what true leadership looks like and the keys to successful research. The goal is to get you to think critically about what every idea means for you and your company.
- Garvin, David A., “Building a Learning Organization.” *Harvard Business Review*, July/Aug. 1993. Using the “three M’s” (Meaning, Management, and Measurement) as a framework, the author defines learning organizations as skilled at five main activities: systematic problem solving, experimentation with new approaches, learning from past experience, learning from the best practices of others, and transferring knowledge quickly and efficiently throughout the organization. A measurable learning audit should include cognitive and behavioral changes as well as tangible improvements in a result.
- Nadler, Gerald, and Hibino Shozo, *Breakthrough Thinking: The Seven Principles of Creative Problem Solving*. Prima Publishing, 1994. This American/Japanese collaboration contains the results of the authors’ ground-breaking studies on how the most intuitive and creative leaders and organizations solve problems. They show how to improve incorrect thinking, which they contend accounts for the failure of many enterprises.
- Pegasus Communications, *The Systems Thinker*. This periodical offers articles, exercises, tools, and program and conference information for those interested in developing the five disciplines of the learning organization: systems thinking, personal mastery, mental models, shared vision, and team learning. For those interested in problem solving, one of the most interesting features in each volume is a “causal-loop analysis” of a well-known but poorly understood problem.
- Porter, Michael, *Competitive Strategy*. The Free Press, 1980. The author addresses major questions of vital concern to managers and presents a comprehensive set of analytical techniques for understanding a business and the behavior of its competitors. The book presents techniques to anticipate and prepare for, rather than simply react to, such as sudden competitor moves or shifts in the industry.

- Roberts, Edward B., *Managerial Applications of Systems Dynamics*. Productivity Press, 1981. This book provides an overview of system dynamics applications to management, science, management cybernetics, modeling, planning, and forecasting. It includes discussions of manufacturing, marketing and distribution, research and development, management control and financial applications, and the application of system dynamics to managerial problems.
- Senge, Peter, *The Fifth Discipline: The Art and Practice of the Learning Organization*. Doubleday Currency, 1990. In this book, the author describes how systems thinking is a cornerstone of the learning and successfully functioning organization. More broadly, Senge illustrates how an organization learns to be great through the practice of five disciplines: systems thinking, personal mastery, mental models, shared vision, and team learning.
- Senge, Roberts, Roth, Smith, and Kleiner, *The Fifth Discipline Field Book*. Doubleday, 1994. An analog to the book listed directly above, this field book describes how companies are using the tools and technologies of the five disciplines to make the learning organization a reality. The book contains exercises, suggestions, stories, and examples from over 70 contributors relating to the field of systems thinking and organizational learning.
- Swieringa, Joop, and Andre Wierdsma, *Becoming a Learning Organization*. Addison-Wesley, 1993. The authors contend that continual organizational development is essential for remaining competitive. This book extols the wisdom of learning from experience and teaches companies how to do it.
- Tagliere, Daniel A., *How to Meet, Think and Work to Consensus*. Pfeiffer & Company, 1993. Small groups and teams are essential to an organization's decision-making process. This book presents a method that makes meetings a productive and integral part of the work process. The author provides tools for improving the quality of decisions, solving problems, furthering creativity, and achieving reliable solutions through a collaborative team process.
- Waldrop, M. Mitchell, *Complexity: The Emerging Science at the Edge of Order*. Touchstone Books, 1993. This book affords you an understanding of systems thinking by explaining the formation of The Sante Fe Institute, a systems thinking "think tank."

SECTION 4

Forms

Leading in a Networked World

Question Sheet

Use this form to write your question for Margaret Wheatley or for discussion among your colleagues. Please write clearly.

Name (optional) _____

Organization _____

Location _____

Your question (25 words or less):

Tel 1-800-489-8814 (from within U.S.)
801-303-7412 (from outside U.S.)

Fax 1-877-892-0170 (from within U.S.)
646-349-3661 (from outside U.S.)

Email leadership2001@linkage-inc.com

LINKAGE EXCELLENCE IN MANAGEMENT & LEADERSHIP EVALUATION FORM

PLEASE RETURN THIS FORM TO YOUR SITE COORDINATOR OR FAX TO 781-862-2355.

NAME _____ TITLE _____

ORGANIZATION _____

PHONE _____ EMAIL _____

Please indicate functional area (only check one):

Finance Human Resources Manufacturing/Operations Marketing R&D Sales Other (specify) _____

How many people do you have reporting to you (include all levels)? Number: _____

Please indicate your job level (only circle one):

President or Officer Vice President or Director Manager/Supervisor Team Leader Sales Rep. Customer Service Rep.
 HR, T&D, OD Practitioner Other: _____

1) Please indicate a rating for each of the following evaluation criteria by checking the appropriate box.

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
Length of Presentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Effective presenters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Useful participant materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Useful question and answer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Live (versus taped) broadcast important	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2) Please give a general overall comment about the program. _____

3) Can Linkage use this comment for promotional purposes (including name and organization)? YES NO

4) On a scale of 1-10 (10 = Outstanding), how would you rate this satellite broadcast session? Rating: _____

5) How many viewers would you estimate attended this event (in the room with you)? Number: _____

6) Which speakers are you most interested in seeing at the next Linkage Satellite (Distance Learning) Learning Series?

(Please rate your top ten, "1" being most interested, "10" being least interested)

- | | | |
|--------------------------|-------------------------|-------------------------|
| ___ Peter Senge | ___ Jeff Bezos | ___ Carly Fiorina |
| ___ Steve Case | ___ Clayton Christensen | ___ Elizabeth Dole |
| ___ Maya Angelou | ___ Don Tapscott | ___ Nicholas Negroponte |
| ___ Doris Kearns Goodwin | ___ Michael Porter | ___ Tom Peters |
| ___ Francis Hesselbein | ___ John Kotter | ___ Anna Quindlen |
| ___ Michael Hammer | ___ Noel Tichy | ___ Andy Grove |
| ___ Gary Hamel | ___ James Champy | ___ John Chambers |
| | | ___ Other _____ |

PLEASE RETURN THIS FORM TO YOUR SITE COORDINATOR OR FAX TO 781-862-2355.